

News

ARIZONA Department of Revenue

1 6 0 0 W E S T M O N R O E • P H O E N I X A R I Z O N A 8 5 0 0 7

FILE No.: NR04004

February 9, 2004

Contact: Dan Zemke
Public Information Officer
602/716-6882

FOR IMMEDIATE RELEASE

STATE MAILING NOTICES TO LADEWIG CLAIMANTS

The Arizona Department of Revenue (DOR) has started mailing the notices of dividend calculations that are required by the settlement agreement in the *Estate of Helen H. Ladewig v. Arizona Department of Revenue*, No. TX97-00075 class action tax refund case.

Through March 20, DOR will mail notices to over 700,000 individuals who are entitled to a refund of taxes they paid to Arizona on dividend income in 1986 through 1989. This mailing will include an explanatory cover letter, a notice of dividends, and a dispute form.

The notice of dividends will state the amount of dividend income, Arizona taxable income, and Arizona taxes paid for each year from 1986 through 1989 according to DOR records. The recipients are expected to compare these amounts with their own records. If they agree with the amounts for each year, no further action by them is

-- more --

needed. The first installment of their refund will be mailed to them by August 20, 2004 in accordance with the settlement agreement.

If they disagree with any of the information in the notice of dividends, they must file the dispute form along with copies of any proof that they have within 45 days. This should be sent to the post office box indicated on the dispute form.

The actual amounts of the refunds are not known at this time, but will be provided to claimants after any disputes have been resolved.

Taxpayers having any questions about their notices should call DOR at (602) 542-0700. The voice message will direct them to the proper area to answer their questions.

###